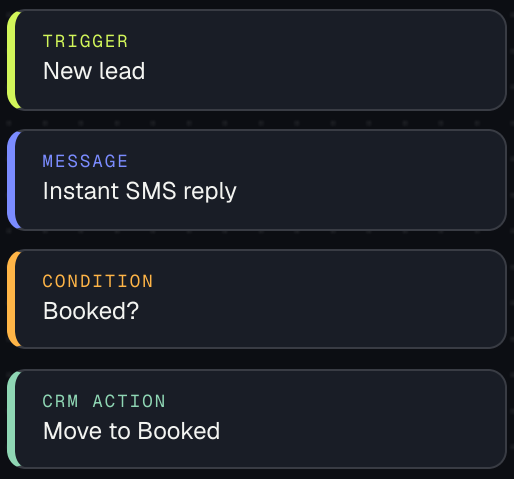
Your HighLevel Expert

FREE CHECKLIST · 2026 EDITION

GoHighLevel Account Audit Checklist

30 checks to find where your HighLevel account is leaking leads: pipelines, workflows, follow-up, calendars, forms, integrations, SMS and reporting.

30 checks | 8 areas | Fix-first priority list



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HOW TO USE THIS CHECKLIST

Test the account. Don’t just read the settings.

Before you start

1. Create a test contact with your own email and mobile number, tagged **test**.
2. List every way a lead enters: forms, funnels, calendars, ads, phone.
3. Audit one sub-account at a time, starting with the one that earns most.

As you go

- Tick each check that passes.
- Circle anything that fails or you are not sure about.
- Use the “What to fix first” page to decide the order.

01 Pipelines & contacts

- [ ] 1 **Pipeline stages match how you actually sell**
  Stages nobody moves cards into usually mean the pipeline was copied from a template.
- [ ] 2 **No opportunities stuck in one stage for weeks**
  Stuck deals are usually a missing follow-up, not a lazy salesperson.
- [ ] 3 **Duplicate contact rules fit how leads arrive**
  Match on email, phone, or both, the way your forms and ads collect them.
- [ ] 4 **Custom fields are used and mapped**
  Archive fields nobody fills in; map the ones automations rely on.
- [ ] 5 **Every tag has a known purpose**
  An unexplained tag list is a list of hidden triggers. Document each one.

02 Workflows

- [ ] 6 **Every workflow that should run is Published**
  Draft workflows save changes but never run.
- [ ] 7 **Trigger filters point at the right form, calendar, pipeline or tag**
  A filter set to the wrong item quietly keeps everyone out.
- [ ] 8 **Re-entry is set on purpose**
  Decide whether a contact may go through the same workflow again.
- [ ] 9 **No two workflows react to the same event**
  Overlaps double-message people or cancel each other out.
- [ ] 10 **Goals or exits stop follow-ups once people reply or book**
  Nobody who already booked should get “still interested?”.
- [ ] 11 **Execution logs show no skipped or failed steps**
  Open the log for one recent lead and read every step.

03 Lead follow-up

- [ ] 12 **First reply goes out within minutes**
  Submit your own test form and time the first SMS or email.
- [ ] 13 **Someone current is notified about new leads**
  Check notifications go to a person who still reads them.
- [ ] 14 **Follow-up continues after the first message**
  One message and then silence is where most leads go cold.
- [ ] 15 **Missed-call text-back fires (if you use it)**
  Call your number from a test phone and check.

04 Calendars & bookings

- [ ] 16 **Availability and time zones are correct**
  Book a test appointment and compare the confirmation time.
- [ ] 17 **Connected Google/Outlook calendars do not block real slots**
  All-day or recurring events can hide whole days.
- [ ] 18 **Confirmations and reminders arrive with the right details**
  Date, time and meeting link, on SMS and email.
- [ ] 19 **No-shows and reschedules trigger a next step**
  Missed bookings should never just disappear.

05 Forms, surveys & funnels

- [ ] 20 **Every form creates a contact with the right fields**
  Submit each form once with test data.
- [ ] 21 **Every form starts the right automation**
  Replaced or duplicated forms often lose their trigger.
- [ ] 22 **Thank-you pages and redirects work on mobile**
  Test on a phone, not just desktop.

06 Integrations

- [ ] 23 **Facebook / Instagram lead ads still sync**
  Send a test lead; expired permissions are common.
- [ ] 24 **Payments, Zapier and webhooks are authorised and succeeding**
  Check recent runs, not just the connection screen.
- [ ] 25 **A dedicated, authenticated email sending domain is set up**
  SPF, DKIM and DMARC should all show as passing.

07 SMS & A2P 10DLC

- [ ] 26 **Brand and campaign are approved, number attached**
  Required by US carriers for business texting from local numbers.
- [ ] 27 **Forms collect clear SMS consent**
  Consent wording near the phone field, with a privacy policy link.
- [ ] 28 **Replying STOP marks the contact as DND for SMS**
  Test it from your own phone.

08 Reporting

- [ ] 29 **Lead sources are recorded**
  If attribution is empty, ad decisions are guesses.
- [ ] 30 **Your dashboard shows the few numbers you decide on**
  New leads, booked calls, show rate and pipeline value, excluding test contacts.

→ What to fix first

1. **Anything losing leads now:** forms not creating contacts, workflows in Draft, broken integrations.
2. **Anything risking compliance:** missing SMS consent, broken opt-outs, unregistered texting.
3. **Anything slowing follow-up:** missing notifications, single-message follow-up, no reminders.
4. **Everything else:** clean-up, naming and reporting.

Keep a short note of what you found and changed. The next audit will take a fraction of the time.

RATHER HAVE AN EXPERT CHECK IT?

Want it done for you?

Limited-time offer · may end soon

FREE GoHighLevel account audit

Normally ~~$50~~ per sub-account. **Free today.**

I go through all 30 checks inside your account and give you a clear list of what works, what is broken and what to fix first.

Request my FREE audit → | **Book a 30-min call**

01
Request the audit
A one-minute form.

02
Book a short call
We discuss your business and set up access safely. No passwords.

03
Get your findings
What to fix first, in plain English.

FREE TOOLS

GHL Troubleshooter →
Something broken? Find the likely cause step by step.

GHL Automation Builder →
Plan your next workflow visually before you build it.

Questions? Email support@yourhighlevelexpert.com. This checklist is general guidance; menu names in your account may differ slightly.